

Hotel Alternatives – US – July 2019

Report Price: £3695 | \$4995 | €4400

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This report looks at the following areas:

- Takeaway 1: Hotel alternatives have a bright future
- Takeaway 2: Safety and loyalty programs are issues for hotel alternatives
- Takeaway 3: Branding is important



"Non-hotel lodging choices available to travelers have become a juggernaut in the travel industry. Younger, experience-minded travelers jumped on early, and remain strongest supporters. While hotel alternatives are attractive to young travelers and grown-up early adopters, they have to start filling the gaps in satisfaction to prevent their fans from aging out of alternatives."

- Mike Gallinari, Travel &

isure Analyst Buy this report now

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Table of Contents

OVERVIEW

- What you need to know
- Definitions

EXECUTIVE SUMMARY

- Overview
- Observations
- Takeaway 1: Hotel alternatives have a bright future

Figure 1: Hotel alternative brand usage and reasons for usage, by age group, April 2019
Figure 2: Perceptions of affordability of homeshares vs hotels, by age group, April 2019

- Opportunity
- Takeaway 2: Safety and loyalty programs are issues for hotel alternatives
- Opportunities

Figure 3: Desired features of hotel alternative loyalty programs, by experience with alternatives, April 2019

- · Takeaway 3: Branding is important
- Opportunities

Figure 4: Hotel alternative preference, by age group and parental status, April 2019

What it means

THE MARKET - WHAT YOU NEED TO KNOW

- A "hotel alternative" by any name
- · The big players are doing well
- Vacation trends are shifting
- The wild is calling
- An unpredictable economy gives homesharing a boost

MARKET BREAKDOWN

- Airbnb
- Company Financials
- Expedia Group

Figure 5: Vrbo logo and mobile site redesign, June 2019

- Company Financials
- Booking Holdings
- Company Financials
- OYO
- Sonder
- Kampgrounds of America (KOA)

What's included

Executive Summary

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MARKET PERSPECTIVE

Vacation trends favor homeshares

Figure 6: Preferred vacation length and frequency – by age, 2014-18

Vacationers are seeking the road less traveled

Figure 7: Attitudes toward vacation destinations, February 2019

The outdoors are getting greater

Figure 8: Enjoyment of camping/hiking, by age group, 2014-18

Working retirees provide a good host base

Figure 9: Boomer attitudes towards continued employment, March 2019

MARKET FACTORS

· Economic gains are unpredictable

Figure 10: GDP change from previous period, Q1 2007-Q1 2019

Hotel ADR climbing

Figure 11: Monthly hotel ADR, March 2017-April 2019

- Pass-through income makes hosting worth its SALT
- High participation in the gig economy works for alternatives

Figure 12: Percentage of employed adults with a "side gig," by generation, March 2019

KEY PLAYERS - WHAT YOU NEED TO KNOW

- Hotels and alternatives are moving on each other
- · Recreational vehicles look forward, not at the rear view
- · Loyalty programs aren't helping alternatives
- · Homeshares have a lot against them
- Hostels, but less hostile
- Temporary rooms for temporary guests
- Wellness gives new areas a shot in the arm

WHAT'S UP?

- · Hotels are getting into alternatives
- Airbnb is getting into everything
- · Limited-time hotels
- RVs are rolling out updates

Figure 13: Airstream "Bambi" trailer features

WHAT'S DOWN?

- Loyalty programs aren't great for alts
- · Perception that homeshares hurt local economies

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- · Regulation threatens the homeshare model
- Alternatives make headlines with issues of safety and prejudice

WHAT'S NEXT?

- A hostel by any other name
- Hotels will deploy their own mod squads
 Figure 14: Flying Nest modular accommodation
- · Wellness tourism give alts a leg up

THE CONSUMER - WHAT YOU NEED TO KNOW

- · Airbnb is the industry leader
- Younger travelers get to stay in alternatives, older ones have to
- · The proof is in the pudding
- Safety is paramount
- People want unique lodging, not unique FTPs
- · Hotels are seen as more responsive
- Host expertise is nice, but not necessary

HOTEL ALTERNATIVE GUEST SEGMENTATION

- Factors
- Avid Adventurers (AAs) (37%)
- Leery Lodgers (LLs) (26%)
- Traveling Traditionalists (TTs) (38%)

Figure 15: Hotel alternative guest segments, April 2019

NUMBER AND TYPE OF STAYS

Alternatives are seeing lots of repeat business

Figure 16: Mean and median stays in paid accommodations, 2017-19

· Alternatives have lots of room to grow

Figure 17: Types of accommodations stayed, April 2019

There's Airbnb, and everyone else

Figure 18: Alternative brands used, April 2019

 Homeshares and the outdoors more popular with younger lodgers

Figure 19: Hotel alternative brands used, by age group, April 2019

REASONS FOR USING HOTEL ALTERNATIVES

Perceptions of alternatives improve with experience

Figure 20: Reasons for using hotel alternatives, April 2019

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Full Report PDF

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 Younger travelers seek alternatives; older travelers settle for them

Figure 21: Reasons for using hotel alternatives, by age group, April 2019

Even older travelers can be won over

Figure 22: Reasons for using hotel alternatives among age 45+, by experience, April 2019

Parents want to be part of the action, but only part-time
 Figure 23: Reasons for using hotel alternatives among ages
 18-44, by parental status, April 2019

Alts have appeal to different segments

Figure 24: Reasons for using hotel alternatives, by segment, April 2019

PERCEPTIONS OF HOMESHARES VS HOTELS

Homeshares win on uniqueness and experiences
 Figure 25: Perceptions of homeshares vs hotels, April 2019

Experience matters

Figure 26: Perceptions of homeshares vs hotels, by experience with homeshares April 2019

Homeshares aren't hip

Figure 27: Perceptions of homeshares, by age group, April 2019

· Homeshares lose any perception of affordability with age

Figure 28: Perceptions of affordability of homeshares vs hotels, by age group, April 2019

Homeshares aren't "for" the over-55 crowd

Figure 29: Perceptions of appropriateness of homeshares, by age group, April 2019

 Leery Lodgers stay in alternates despite views favoring hotels

Figure 30: Perceptions of hotels vs homeshares, by segment, April 2019

Even homeshare champions don't think they're safer

Figure 31: Perceptions of safety, by segment, April 2019

CHOOSING A HOTEL ALTERNATIVE

Security is the top priority

Figure 32: Reasons for choosing a hotel alternative, April 2019 Figure 33: Reasons for choosing a hotel alternative, by gender, April 2019

"A" for Safety

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 34: TURF analysis – decision factors for choosing hotel alternatives, April 2019

Leery Lodgers want to be close to the action
 Figure 35: Proximity factors in choosing hotel alternatives, by

HOTEL ALTERNATIVE LOYALTY PROGRAMS

Preferred FTP features

segment, April 2019

Figure 36: TURF analysis – Hotel alternative loyalty programs, April 2019

Hotel alternative FTPs don't need to be unique

Figure 37: Desired features of hotel alternative loyalty programs, by experience with alternatives, April 2019

Parents are more interested in perks

Figure 38: Desired features of hotel alternative loyalty programs, by parental status, April 2019

ATTITUDES TOWARD HOTEL ALTERNATIVES

Hotel alternatives are preferred by parents, younger travelers

Figure 39: Hotel alternative preference, by age group and parental status, April 2019

Alternative guests are more complacent about hotels
 Figure 40: Attitudes of lodging as simple quarters, April 2019

· Hotels are seen as more responsive

Figure 41: Attitudes toward service, April 2019

 Alternative guests value (but don't seek) their hosts' expertise

Figure 42: Attitudes toward host value, April 2019

Alternatives have ease of navigation, some level of trustworthiness

Figure 43: Attitudes toward hotel alternative infrastructure, April 2019

More digitally savvy travelers have the most concerns about contact

Figure 44: Concerns about online communication, by age group, April 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Abbreviations and terms
- Abbreviations

What's included

Executive Summary

Full Report PDF

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APPENDIX - THE MARKET

Figure 45: Preferred vacation length and frequency – nets, by age, 2014-18

Figure 46: Enjoyment of camping/hiking, by age group,

2014-18

Figure 47: Attitudes toward hotel alternatives, April 2019

Figure 48: Monthly hotel ADR, March 2017-April 2019

What's included

Executive Summary

Full Report PDF

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Powerpoint Presentation

Interactive Databook

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